A New Technology Plan for a New Year

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Why Write a Technology Plan

- A good technology plan is like a road map for your library's technology future

- Critical for receiving technology-related funding

- Keeps library's technology up-to-date, which helps you provide the best service to your patrons

- Gives current and future library employees and board members an idea of what the library's technology goals are

Put Together a Technology Planning Team

- Include library staff, IT professionals, board members, and, if possible, community members in the planning team

- Need help facilitating? Reach out to your Library Technology Coordinator!

- Some of the responsibilities of the Technology Planning Team will include:
  - Assessing current technology
  - Identifying technology needs and priorities
  - Drafting a technology vision statement
  - Preparing a budget and timeline
  - Drafting the technology plan
  - Monitoring the plan's implementation
  - Ensuring stakeholder buy-in
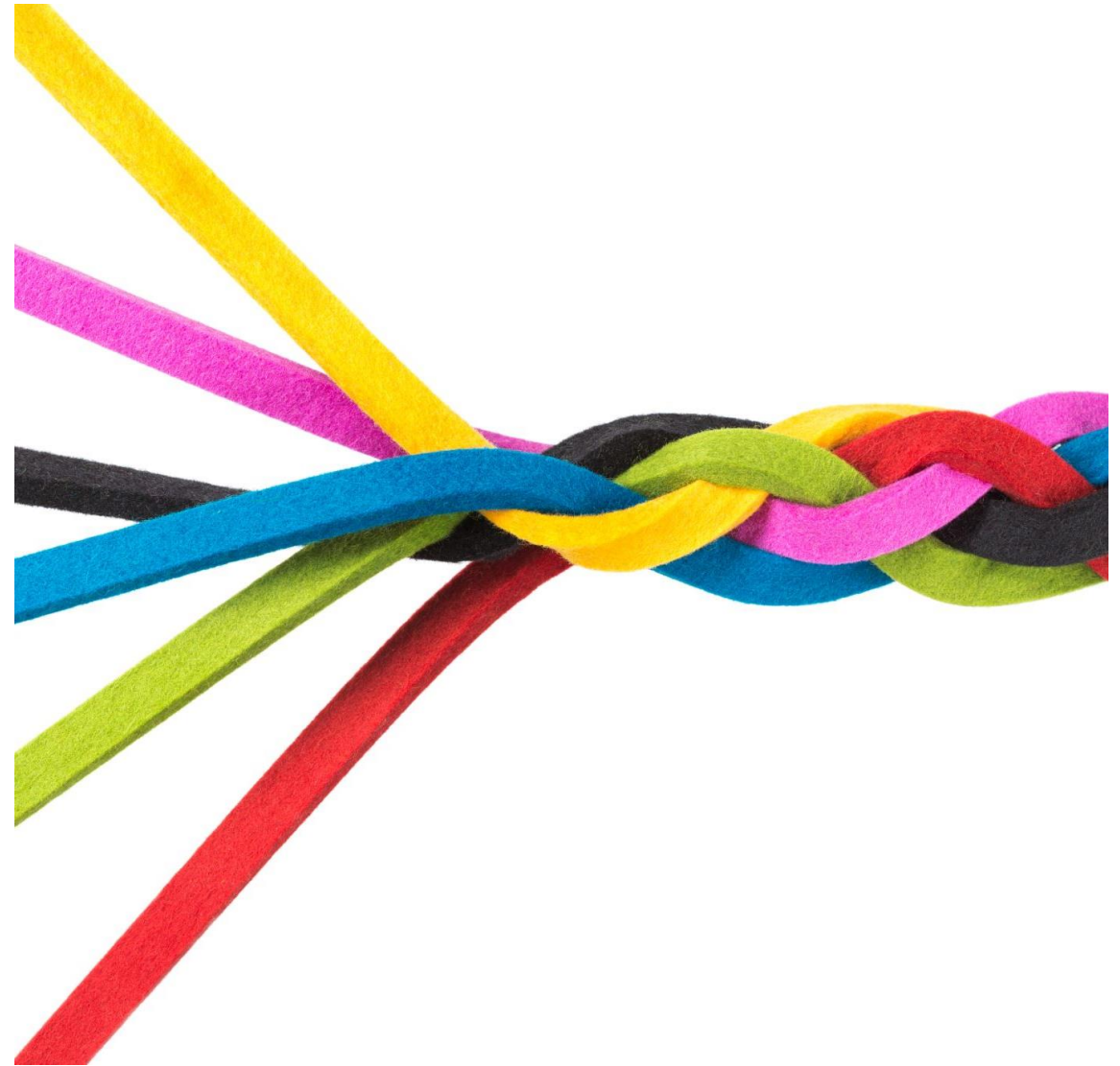
Technology Plan Pause

Thinking about your staff, board members, and community – who would you want to be on your technology planning team? What strengths do they each bring to the plan?

Find a Template that Works for You

- There is no hard-and-fast rule on what a technology plan should look like – it just needs to work for you and your library
- The length of the plan is also up to you – I typically suggest that it covers about 3 years
- There are several technology plan templates available online
- Reach out to your Library Technology Coordinator for sample templates

Add Your Mission Statement and Technology Vision Statement

- Provide the mission statement for the library
- The technology vision statement links your library's mission statement to your technology plan
- How does technology relate to the overall mission of your library?
- Your mission statement and technology vision statement will help guide your technology planning

Write a Plan Justification

- Write 1 – 2 paragraphs about your library's technology goals and how they relate to your library's mission

- Questions to answer in your plan justification:
  - Why is technology important to achieving your library's overall mission?
  - What role does technology plan in the library's services?
  - What is your technology vision statement?

Technology Plan Pause

What is one part you would include in your technology plan justification?

Include an Internet Safety Policy (CIPA)

- If your library needs to be CIPA-compliant (ex: to receive E-rate), it is necessary for your library to have an Internet Safety Policy

- This policy addresses the following issues:

  - Access by minors to inappropriate matter on the Internet
  - The safety and security of minors when using email, chat rooms, and other forms of direct electronic communications
  - Unauthorized access including "hacking" and other unlawful activities by minors online
  - Unauthorized disclosure, use, and dissemination of personal information regarding minors
  - Measures designed to restrict minors' access to materials harmful to them

**NOTE: You must have one public meeting where you discuss your approach to an Internet Safety Policy. Before the meeting, you're required to advertise the meeting. The meeting announcement should specifically reference the fact that Internet safety will be covered. The school/library is only required to have the meeting once, ever.

Remember to retain the meeting announcement and an agenda or meeting minutes with your E-rate documents.

E-Rate or CIPA Questions

South Dakota has an E-rate coordinator who provides outreach and training to SD libraries and schools.

Contact the E-rate coordinator to subscribe to SD E-rate listserv messages about training opportunities, filing advice, and deadlines.

Debra M. Kriete, Esq.

South Dakota E-rate Coordinator

dmkriete@comcast.net / 888-232-0241 (toll free)

Complete a Technology Assessment and Inventory

- Current technology
  - List current computing and telecommunication technology being used at the library
  - Note when each item was purchased and approximately when it will need to be replaced
  - Use a technology spreadsheet to keep track of your current technology
  - Use the Toward Gigabit Libraries Toolkit to assess your current broadband and IT environment
  - Do you have any critical issues that need to be addressed?

- Future technology
  - List hardware, software, telecommunications, and information technologies the library hopes to implement during the lifetime of the technology plan and when it is planned to be implemented
  - Include a discussion of upgraded electrical systems required to handle new technologies

What to Consider When Evaluating Technology...

- Usability
- Performance
- Price
- Quality of technology
- Warranty
- Quality of the product

- User (staff and patron) feedback
- Usage statistics
- Any issues with devices
- Joining E-rate or meeting CIPA compliance

Technology Plan Pause

Brainstorm the details you would want to include in your "current technology" section. What do you include? What about for your "future technology" section?

Craft Your Technology Strategic Plan

- Goals – Tend to be broad and convey the themes of the objectives you are trying to reach
  - Objectives – More specific and support the goal
    - Strategies – Specific actions the library staff or board will do to meet the objective in support of the goal
- Your technology strategic plan should work with your library's strategic plan, if your library has one
- Each objective and strategy can also include their own timeline and point person – which keeps the plan on track and both library staff and trustees engaged
- When crafting goals, keep in mind the community you serve – what are their technology needs? What are your staff technology needs?

Example Goal - Technology Strategic Plan

- Goal A – To provide technology training.
  - Objective A.1 – Develop and implement a training program for patrons. (Ongoing, Librarian 1)
    - Strategy A.1.a – Schedule hour-long patron programs once per month on topics decided by community members and library staff. (Ongoing, Librarian 1)
    - Strategy A.1.b – Upload technology programs for patrons to the library's YouTube channels. (Ongoing, Librarian 1)
  - Objective A.2 – Provide staff with opportunities for technology training. (Ongoing, Librarian 2)
    - Strategy A.2.a – Schedule a session between the State Library's Library Technology Coordinator and library staff for technology trainings on patron programming. (April 2022, Librarian 2)
    - Strategy A.2.b – Give staff 1 hour every other week for attending/watching webinars or completing continuing education for library technology. (Ongoing, Librarian 2)

Technology Plan Pause

What is one goal, one objective, and one strategy that you would include in your plan?

Crunch the Numbers and Add Your Budget

- Looking at your overall budget, what amount is currently set aside for your technology?

- Break down your technology budget into specifics – internet, upgrade and maintenance costs, costs for intended new technology

- Indicate where you receive funding, including grants and E-rate

- Make sure to mention any maintenance contracts

- This section will be revised more than once before your plan is up – and that's okay! Be sure to update it whenever you receive new funding, such as from a grant, and when you plan to purchase new technology

How You'll Check in on Your Plan - Evaluation

- Create an evaluation statement that includes…
  - How the library plans to determine if the technology plan goals are being met
  - How you know if the technology is having a positive impact on the staff, patrons, and community
  - How well the technology is helping the library reach its overall goals
  - How often the technology plan will be reviewed and by whom
- You can evaluate your technology plan by…
  - Surveying, holding focus groups with, or interviewing patrons, community members, and staff
  - Checking if objectives and strategies are met on time
  - Creating an evaluation for each objective (optional)
  - Usage reports on technology
- Technology plans should be reviewed and updated about every three years

Practice Makes Perfect – Adding Training to Your Technology Plan

- Provide detail on training for staff and patrons on current technology

- Include information on what types of training are offered, by whom, and how often

- Types of training provided could include, but is not limited to, programs on searching databases, word processing, using the OPAC, etc.

Technology Plan Pause

What is one area of technology training you would like your staff (or you) to receive? What is one technology training program you'd like to offer your patrons?

Don't Forget Your Appendices

- Current hardware inventory
- Filtering records (ex: purchase order)
- Software/license inventory
- Grant searches for library technology funding
- Maintenance contracts
- … and anything else related to your library technology

Saving the Best for Last – Writing Your Executive Summary

- What have you learned about managing your library's technology now that you've completed this library Technology Plan?

- Answer these questions in your executive summary:
  - What changes have you made at your library as a result of the technology plan writing process? Address both physical changes to equipment and services as well as new management strategies or philosophies.
  - What new technology, processes, or ideas do you plan to implement?
  - What needs do you realize you have?
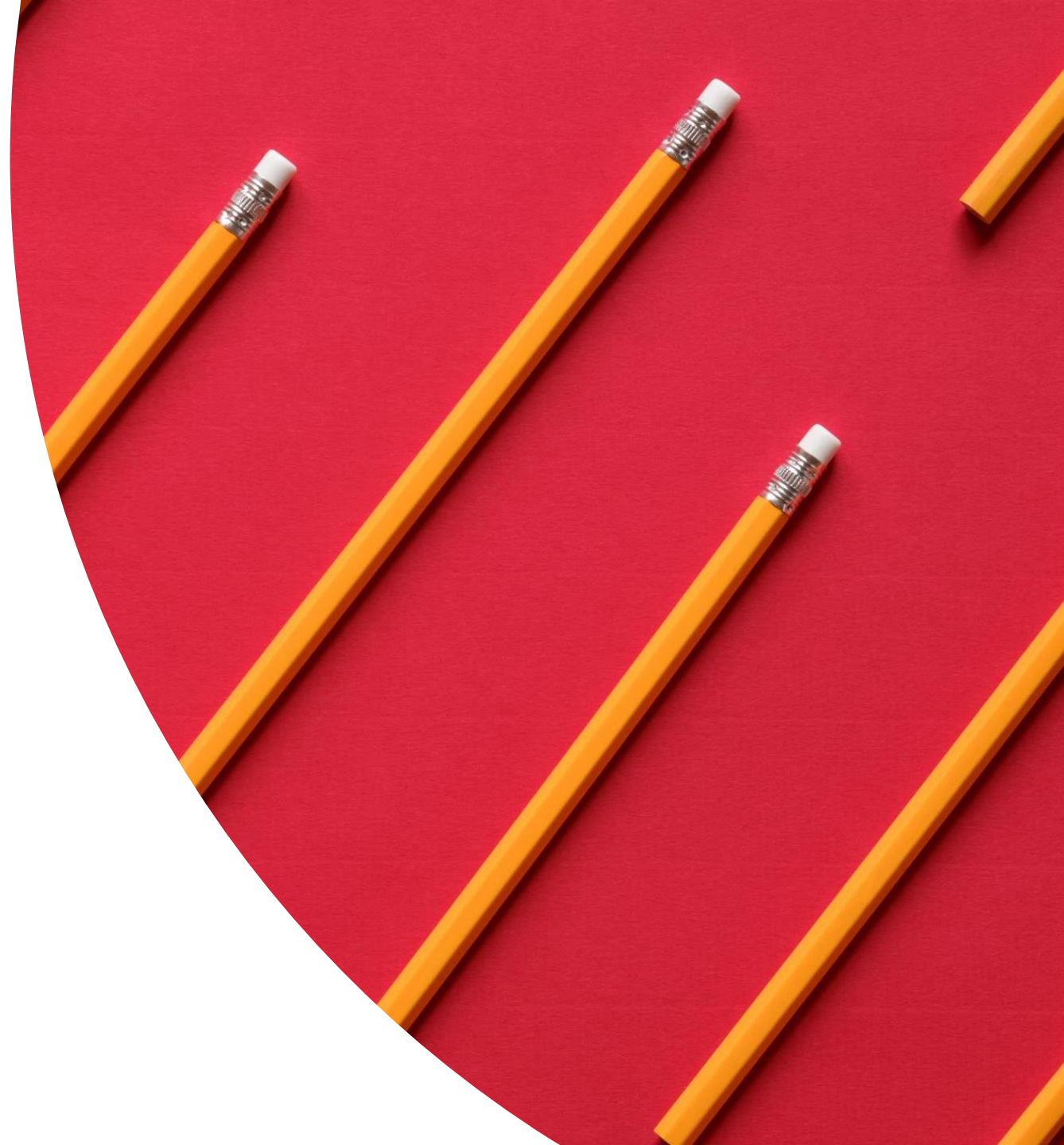
Now What? Keeping You, Your Staff, and Your Board Engaged

- Everything in the plan should be assigned – they should be in someone's performance plan, contract, or expected duties

- The technology plan should be incorporated into each Board Meeting – but cover just one or two goals at a time

- Put objectives and strategies in chronological order

- The technology plan should inform your to do list

- Your technology plan is a living document – don't be afraid to update it!

Technology Plan Pause

How are you going to keep yourself, staff, and board members engaged?

Resources

- South Dakota Public Library Technology Slack Channel - https://join.slack.com/t/sdpublibtech/shared_invite/zt-tec4ei6b-3g6Hf79SK0SUFn4gUWbksA

- South Dakota State Library LibGuide: Technology Planning Guide - https://libguides.library.sd.gov/c.php?g=667085&p=8585121

- Toward Gigabit Libraries - https://internet2.edu/community/community-anchor-program/cap-library-resources/toward-gigabit-libraries/

- WebJunction: Technology Planning - https://www.webjunction.org/explore-topics/tech-planning.html

Thank You!

- Questions?

- Have further questions or want to chat? Email me at cheyenne.chontos@state.sd.us.

- Take our survey to let me know how I did and how I can improve!